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AUTHOR	Morton, Kent
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ABSTRACT

A certain amount of paper work is necessary in school systems, but it must be handled in a rational, planned, and controlled manner. Most problems begin and end with the lack of training for paper work and management systems. To avoid this problem, an operating procedures manual was developed for the Special Education Instructional Materials Center (SEIMC). A built-in change factor was incorporated in the manual in that the basic format remains the same but the working parts are constantly updated and revised by the clerical staff and management. The main idea of the manual is to apply proven business methods of administration to any type of school setting or project where paper work and training are needed. The possibility of using this approach with small school systems that do not receive extensive funding cannot be understated. (Author/MLF)

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PAPER WORK CRISIS

IN

EDUCATION

Kent Norton

St. Paul Public Schools
Special Education Instructional Materials Center

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BACKGROUND

The culmination of over three years of work by the author of this paper and the SEIMC director, Lily-Beth Wahlberg, is summarized by the following work. The paper was originally written to be published by a magazine that was funded by a private foundation stressing heuristic models. The magazine folded before this particular work came to be published.

The direct result of this paper was a manual, the OPM,[1] produced directly for use of the SEIMC; later being reproduced by the ERIC system and adapted to several IMC's around the country.

This paper was presented, informally, with the manual at the Council for Exceptional Children National Convention (CEC) in Dallas, Texas in April of 1973. The outstanding aspect of this work and the manual was that it was produced for less then $500.00, using in-house expertise.

The heuristic modeling approach was used with extensive use of employee participative management programs. The possibility of using this approach with small school systems that do not receive extensive funding cannot be understated.

In sum, our accountability measures that are being required today are extensive, exhustive and frustrating to try to administer pragmatically. This model may solve, at least, the "money" problem that has become a block to action in administrative systems.

May 19, 1973

Dear Forum Member:

Unfortunately, the section of the world that we perceive as our reality is not static. Mathematics and physics label, classify, and segment dynamic parts of the whole into categories and apply laws of "perfection" in order to understand the process.

Sometimes, by breaking the whole into many parts we lose sight of the major scheme and original plan. Separate events on a continuum of time flash by so quickly that they are thought to be entities in themselves.

My point is that we have entirely too many professional experts. Granted, most of these "experts" do have a high degree of competency in their respective fields. But today all fields and disciplines, although highly technical, border on others in one way or the other. There are grey interfaced boundaries between the concrete specialities. These grey areas become a sort of "No Man's Land" into which no expert dares venture.

And, as everyone who reads knows, criticism of the schools and their administrators has reached an all time high. Many are starting to feel the squeeze of "professional expertism" creep into their lives.

The school system in the beginning was simple. It was a one-room schoolhouse where the teacher knew all areas of administration because the frame of reference was small. Administration was a matter of hiring teachers and going from school to school to see that the curriculum set by the state was being taught. They could check on the methods, instruct the teachers, and in

general oversee the whole operation for the schools. They had the time to talk to the children and the principals and find out about problems first hand, Corrective action could be suggested and implemented on the spot. The real supervisory and training duties have now been replaced by reports and forms that are handed down through multi-channeled levels of employees and staff. Like the woodpecker who now pecks thousands of holes in a tree and stores small rocks and non-food items because the instinct is so inbred and strong in this particular bird, the usefulness of some school functions and duties have become lost in the ritual of carrying out certain non-essential, unproductive efforts.

Even today, with all of the data storage and retrieval system available to the efficient school manager, most of the "paper threats" still remain. Through my work I have found excessive paperwork that is not handled properly has become the MOST relevant central issue in the battle between the productive vs. the back-logged ineffective administration.

With all of our scientific advances in the field of administration, still many M.A.'s, Ed.D.'s, and even Ph.D's have found that the infamous "publish or perish" syndrome, has given way to the hazy concept of "Paper Pushing"--of which they know little. or nothing. Too many are wrestling with mounds of paper and accomplishing little of their assigned function. The paper tiger has taken on a new form with a more probable threat to everyone who must deal with it.

Paper work is a necessary evil. Most people believe that if it is put off long enough it will just go away. Secretaries, aids, and other helpers are hired to tramp through the battlefield with practically no training or knowledge at all. Even a well trained clerical staff cannot function properly with little or no training in methods or organizational procedures. As for employees, with no clear-cut job function, duties, or orders, they become as lost as anyone, try as they may. Too many inservice training sessions are missed or not scheduled because the administrators

are besieged by the sound of paper seemingly growing out of the woodwork.

"Make a study" is an oft-heard cry from outside and inside the system. Inputs from a variety of sources tend to confuse the issues even worse. Normally, the school board is convinced that a first rate analysis, complete with recommendations, should be made. Of course, it will follow all of the ruses of good studies, which means it will be long, involved, and virtually unreadable except by those who made it. Now more paper is generated and more money is wasted and more outraged people come up with unfeasible, expensive solutions and the study goes to the dusty back shelf.

In most cases we are fighting fire with gasoline. Studies do not coordinate people or systems. They do not implement standards of work nor do they teach anyone working in the system. By the time the study is finished, it has become history. The goals of tomorrow are not planned for by putting down on paper what happened yesterday.

All of this discussion leads back to the salient point that a certain amount of paper work is necessary, but it must be handled more efficiently than is now done. It must be done in a rational, planned, and controlled manner. Most supervisors do not have time for their jobs because of the large amounts of reports, documents, catalogues, letters, and forms that must be reviewed. In any case, most problems begin and end with the lack of training for paper work and managements systems that are encountered and most of the time is lacking in the average office.

There is a great lack of training in the colleges and universities in business methods for the school office. They are not trained for the ordinary but demanding, day-to-day affairs that must be conducted from a desk. Procedures for office management and paper work are left to the college of business which is not in the area of teacher or administration training. The business organization has always been run effectively on sound policies

and procedures. This is mainly because it has to, in order to survive and make a profit. These are the goals of a business.

Up until recently there has been no need to even consider evaluating the school system because money was not that much of a factor. Now with tight money and budgetary cuts, saving and the effective use of materials and talents in the schools are now the prime concern.

It took me a little over two years to accomplish my purpose and justify my even being at the SEIMC Project in St. Paul, Minn. I knew that it had to be organized around sound business tactics and a behavioral approach to the psychology of everyone involved. Most of this sounds good in the form of an idea (theory), but it must be put in a tangible form to work (practice). As far back as the 1800's a man named Taylor decided that work standardization was needed in factories. He became the father of modern-day time study and work methods analyses.

Work standards for factories and business offices were made a matter of fact because the business could not be run on a massive scale and still make a profit. Schools have now become so large and complicated in their operations that they also need standards and work study.

An Operating Procedures Manual had to be developed and its theory put into use in order to have SEIMC operate successfully. The main idea of the OPM is simple: Apply proven business methods of administration to any type of school setting or project where paper work and training were needed. The Project did not have the money nor the desire--much less the time--for a time-consuming study.

My own job description was as follows:

> Evaluate and procedurize office work. Recommend work flow methods. Develop systems concept of work material organization. Establish procedures and operating manual for clerical staff.

> Free director from routine tasks, so as to give more time for administrative duties. Make clerical staff more confident in their work by giving them a plan to work by and training them to use it efficiently. Give seminars to Director and staff in proper business methods.
>
> In the course of my work I wrote an original Procedures Manual describing this particular project. I found not only the clerical staff in need of training but also the director.

I trained with seminar, discussion and critical evaluation of the manual. The manual proved a good trial market for proving management functions have a practical place in the schools.

What about the future? Is the manual viable or did it die after I left? Yes and No. A built-in change (update) factor was incorporated in the manual. I had to reflect a changing pattern of duties and functions within a fixed system. In order to keep interest in the manual and to keep a flow of comments coming in, the clerical staff judges its effectiveness, since they use it the most.

All one aid has to do is initial the proposed change no longer approved or a procedure that must be changed, and it is done. The director reviews the change with the aid and since the employee who deals directly with the situation knows the job best, it is approved.

Monthly meetings are held and the manual is chopped apart. The basic format remains the same but the working parts are constantly updated and revised. Not only does this participation in the management keep standards of work more closely allied

to the real situation but it also pulls the director closer to the clerical problems of the project.

Work is done right because it is clear and concise and is done by skilled employees. This alleviates "emergency" clerical hassles and keeps everybody interested in their jobs.

It is my argument that the individual, rather than the complex study group, can arrive at a reasonable alternative solution to the crisis in paperwork. Studies and recommendations are only as good as their operation and use. If no one is trained in the actual day-to-day operations, costly studies gather dust along with other unused reports.

The ideal instruction process that, in fact, "educates" these students is that one which has a one-to-one communication base. With my method of analyzation and recommendation and instruction, I believe this goal has been finally realized.

I am now working on an actual business procedures training course that could be taught as an inservice course to anyone who needs business-related competence. I would like your comments and suggestions on my method. I have samples of my work for those really interested in what I consider a new turn in school administration.

Of course there is a certain amount of personal counseling, group situation, role playing, gripe sessions that have been used on an experimental basis in St. Paul. These and other ideas may very well flow out from the OPM and go far beyond its original intended use.

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REFERENCE NOTES

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2. Performance BAsed Teacher Education. Volume II. Planning Instruction. Florida: Polk County. (Federal Study) No further data available.